emx

INTEGRATION UPDATE

FEATURING

ALBRIDGE®

AN AFFILIATE OF PERSHING

Questions and Answers

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Q. What is Albridge?
A. Albridge is a leading provider of enterprise data management solutions that deliver a single view of an investor's broad range of assets. Their proprietary technology consolidates and reconciles client account and transaction data from hundreds of data sources representing banking, brokerage, insurance, retirement, managed accounts and more. Albridge processes this cleansed data and uses it to power a variety of downstream technology solutions, including performance reporting, sales practice monitoring, data warehousing, business intelligence, imaging and workflow

Q. I have a subscription to Albridge. What features will be available to me as part of this integration with emX?
A. Albridge Wealth Advisor and eMoney have partnered to make Albridge’s consolidated client account data and industry leading performance reports available directly within emX. Featuring single-sign-on access and nightly updates, this integration allows advisors to always have an accurate view of their clients’ accounts and holdings details and access their favorite Albridge performance reports all from within eMoney’s comprehensive wealth management system.

Q. I am currently not an Albridge subscriber. Are there any features available to me?
A. Access to Albridge is limited to shared clients of Albridge, and eMoney and based on individual enterprise preferences of Broker-Dealers. eMoney users who do not have a Albridge Subscription and are interested in getting one should contact your firm's Pershing/Albridge relationship manager for sales inquiries.

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Q. How do I access the Albridge integration in emX?
A. From the emX Advisor Homepage, find the applications tab and click “Setup” to access the emX Select Page. Here, you will be able to conduct the initial sign-in for all the integration platforms available to you. Before this initial sign-in you will need to obtain your GUID code from your Albridge administrator and enter it in the Albridge section of your emX Select Page. Then, after your initial sign-in, you can navigate to your integration at any point by clicking “Applications” and selecting Albridge.

Q. Do all members of my team have access to the integration features?
A. Only users with an Advisor license will have access to the Albridge integration. Access is not currently available with a Planner’s or Assistant’s license.

Q. Who do I call for support if I have a question or issue?
A. eMoney has a dedicated Client Engagement Team staffed with experts and certified professionals whose goal is to ensure that you get the most out of your eMoney experience. They have a range of support options to meet your needs and can be contacted anytime at 888-362-8482 or customersupport@emoneyadvisor.com to answer questions about accessing and/or generating Albridge data from within emX. With questions specific to Albridge Reports or functionality, please contact the Albridge support team at 877-461-1308.